Commercial Client Relations

IBM GS SDC South

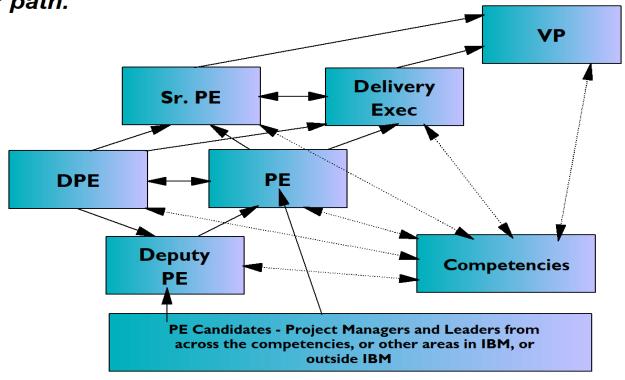
Account Management Process & Relationships

October 1999

PE / DPE Career Roadmap

Project Executive Community

The PE has the opportunity to move through multiple levels ... and they can move in and out of alternative jobs along the career path.



Account Management

Project Executive

Project Executive

Delivery Project Executive

Delivery Team

Role

Customer advocate

Project manager

Focal point to customer executives

Measurements

Customer satisfaction

Schedules

Costs - Profit & Loss

Experience

General business management

Comprehensive I/S knowledge

Extensive project management /

leadership skills

Financial plans and controls

Middle management experience

Focus

Strategic Relationship

Account Management

Delivery Project Executive

Project Executive

Delivery Project Executive

Delivery Team

Role

Owns ongoing delivery Focal point for delivery site

Measurements

Customer satisfaction
Service level agreements met
Costs

Experience

Focus

Service delivery

Account Management

Delivery Team

Project Executive

Delivery
Project
Executive

Delivery Team

Role

Owns ongoing tower delivery Focal point for tower services

Measurements

Customer satisfaction
Service level agreements met
Schedules and Costs

Experience

In-depth technical background in area of expertise

Project management / leadership skills Communications / leadership skills

Focus

Service delivery



Account Management Process

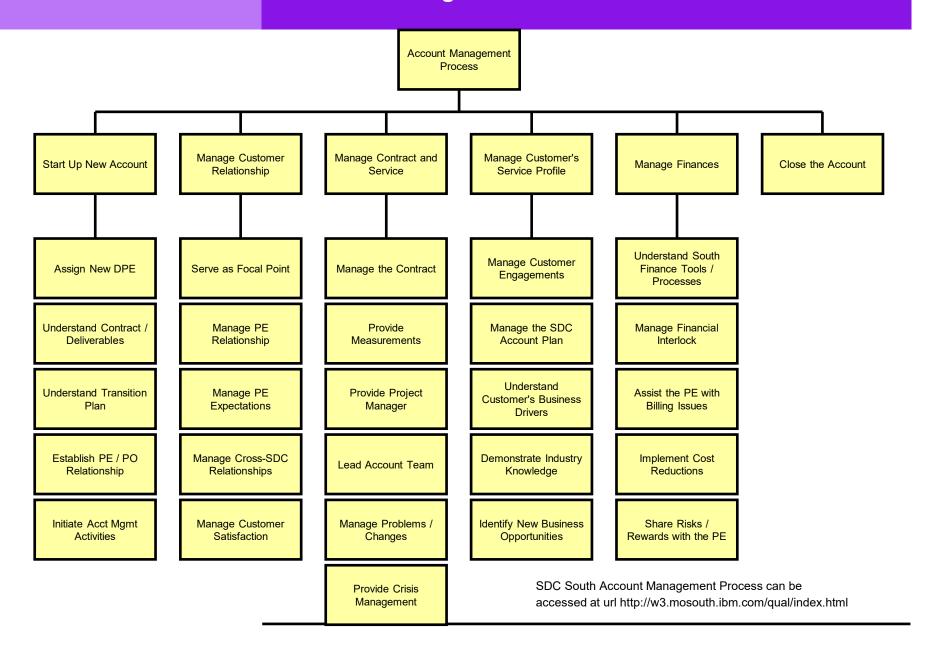
Scope:

To cover all key business aspects of managing the relationship between the customer and SOUTH, and the delivery of contracted services; and of participating in the marketing and negotiation of new services.

Objectives:

- ■Ensure a consistent and effective Account Management approach throughout the SOUTH.
- •Identify/ensure ownership, responsibility, accountability, and awareness of account management-related activities.
- Attain committed PE customer satisfaction goals.
- Attain committed financial goals.
- •Attainment of these objectives is demonstrated/measured by:
 - f Documented PE DOUs and/or Financial Interlocks.
 - f PE satisfaction survey results.
- Other indicators of the objectives are:
 - f SOUTH DPEs consistently using the process.
 - f Customer satisfaction survey results.
 - f SLA (Service Level Agreement) measurements.
 - f Financial measurements.

Account Management Process



New Account / New DPE

Start Up New Account Assign New DPE Verify FTEs with Delivery Towers; update / validate RMS data for account team / Delivery Identify all deliverables, timeframes, and persons responsible. Set up CIF, CLAIM, WebStat Load Contract Deliverables db. **Understand Contract** Measurements. Set up financial tracking Review contract cost case. spreadsheets. Meet with FA to review financials. Schedule regular meetings / Deliverables Work with Measurements Team / PE to with South FA. define measurements reports. Work with SMC Team to implement Understand problem / change management procedures and to set up CPMA. Transition Plan Update South Account Plan db. Develop Financial Interlock agreement. Obtain concurrence Create FOCUS db. Develop issues Establish PE / PO management procedure. from PE and Delivery Towers. Discuss roles & responsibilities with PE/PO and Delivery Document escalation procedure. Relationship Understand Executive Alerts / System Develop PE/South Document of Understanding. Obtain Alerts procedure. concurrence from PE and Delivery Towers. Update OnCall contacts list. **Initiate Acct Mgmt** Discuss Customer Satisfaction baseline survey / expectations Begin writing desk procedures for definable, with PE. repeatable tasks. **Activities** Create Control Book

Contract Management

Understand South service commitments. Ensure delivery of services as committed

- Track missed commitments. Work with Delivery to develop / manage improvement plans
- Serve as primary contact for receiving new requirements or changes. Implement a service request procedure. Follow the South Engagement Process.
- Ensure audit readiness. Maintain a control book

Ensure project management is provided for account projects

- Implement effective project management procedures / tools
- Manage DOU/Interlock as a project

Manage Contract and Service

Manage the Contract

Provide Measurements

Provide Project Management

Lead Account Team

Manage Problems / Changes

Provide Crisis Management Execute Measurements Procedure Obtain / analyze measurements data Work with PE and Delivery to develop

improvement plans; and manage such plans

Provide monthly measurements data to PE Send monthly PE Letter to PE

Update WebStat measurements

Respond to ad hoc requests (should be infrequent)

Renegotiate measurements criteria / data as necessary)

Provide leadership to the South account ream

erform "matrix management"
Serve as focal point for escalations

Ensure issues are identified and resolved
Assist in setting business strategy and

direction

Educate Delivery on customer business / industry expectations. Provide regular status on how South is performing against Customer expectations

Contract Management (cont.)

Follow established Problem Management
Process

Track problems and perform trending analysis

Ensure problems are addressed in a timely fashion

Ensure adequate root cause analysis is performed and reported

Participate in weekly South RCA meetings. (Conduct weekly account RCA meetings to prepare for South RCA mtgs.)

Follow established Change Management Process

Conduct weekly account Change Review meetings

Participate in South Change Management meetings

Represent Customer at Change Management Review Board

Communicate frequently with PE and support PE's communications with Customer

Manage Contract and Service

Manage the Contract

Provide Measurements

Provide Project Manager

Lead Account Team

Manage Problems / Changes

Provide Crisis Management Follow established Recovery Management
Process

Ensure situation / crisis management is provided

Ensure appropriate focus and technical expertise is applied to address and resolve the situation

Ensure Executive Alerts and System Alerts are properly distributed

Finances

- Ensure concurrence of PE and Delivery to planned service costs
- Ensure financial systems are accurately loaded (CIF, CLAIM, RMS)
- Work with Delivery to submit CAPREQs and CPOPS orders
- Meet with FA to analyze plan versus actual expenses / recovery
- Track penalties for missed commitments.
- Meet with Delivery to discuss variances; ensure corrective actions are taken
- Meet with PE to discuss plan versus actual costs
- Obtain PE signoff on changes in service
- Update financial systems with PE-approved changes.
- Provide monthly Commit file updates
- Renew financial interlock on an annual basis

Manage Finances

Understand South Finance Tools / Processes

Manage Financial Interlock

Assist the PE with Billing Issues

Implement Cost Reductions

Share Risks / Rewards with the PE

Inderstand and demonstrate knowledge of outh financial tools and processes

Assist the PE in answering billing questions for South services

Work with the PE to resolve billing issues or South services

Identify opportunities for cost reductions

Vork with the PE / Delivery to analyze and

nplement

legotiate shared risks and rewards with the PE as part of Financial Interlock / DOU discussions.

Customer Relationship

Serve as primary contact into South for PE and Customer

Serve as the South spokesperson for Delivery

Act as primary focal point for OEM vendors if appropriate)

Develop a Communications Plan

Manage Customer Relationship

Serve as Focal Point

Manage PE Relationship

Manage PE Expectations

Manage Cross-SDC Relationships

Manage Customer Satisfaction

Develop / nurture the PE/PO relationship

Support the PE in developing / nurturing the Customer relationship

Ensure frequent, effective communications with the PE Support the PE in communications with the Customer

Listen to and understand the needs of the PEs Support the PE in understanding the needs of the Customer

Be honest and respectful

Deliver on promises; keep commitments; follow up

Be available when the PE needs you

Keep the PE informed

Respond in a timely manner

Only make commitments that you can keep

Work with PE to jointly develop a timely. appropriate responses to the Customer

CAPTURE / PRIORITIZE REQUESTS; implement a service request procedure

CAPTURE / PRIORITIZE ISSUES; implement an issues mgmt procedure (FOCUS)

Customer Relationship (cont.)

Manage Customer Relationship

Serve as Focal Point

Manage PE Relationship

Manage PE Expectations

Manage Cross-SDC Relationships

Manage Customer Satisfaction

Influence and be accountable for PE satisfaction

Work with the PE to influence and be accountable for Customer satisfaction as it relates to South service

Discuss survey expectations with PE (ask the PE what they would rate us today and why)

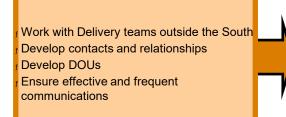
Share the results with Delivery

Work with the PE and Delivery to develop improvement plans

Annually, obtain / analyze PE satisfaction survey results. Work with PE and Delivery to develop improvement plans

Annually, obtain Customer satisfaction survey results from PE. Work with PE and Delivery to develop improvement plans

Frequently communicate "value-add" activities to PE



Portfolio of Services

Serve as focal point for receiving requests for new services
Determine whether requests are out-of-scope or in-scope
Follow South Engagement Process for out-of-scope NBOs
Ensure that an Engagement Manager is assigned.
Follow account Service Request Procedure for in-scope service requests (SRs)
Capture / track requests
Work with PE to prioritize requests
Analyze / respond to requests in a timely fashion

Identify and recommend to the PE new opportunities for services

Assist PE in marketing South services to Customer

Manage Customer's Service Profile

Manage Customer Engagements

Manage the SDC Account Plan

Understand Customer's Business Drivers

Demonstrate Industry Knowledge

Identify New Business
Opportunities

Complete and maintain an up-to-date account plan on the South Account Plans db

Vork with the PE to obtain necessary data

Work with the PE to understand the Customer's business objectives, expectations, and requirements

Work with the PE to understand the Customer's industry sector, strategies, technologies, and directions.

Account Team PBCs

- ■PBC measurements criteria for the commercial account team include:
 - f PE / South DOU and Financial Interlock in place and signed
 - f Customer satisfaction rating >= 8.8 for commercial accounts

8.7 for IBM

accounts (on a scale of 0.0 to 10.0)

- f Financial actuals = plan
- f SLA commitments attained

Acct Mgmt Infrastructure Components

- Contracts / DOUs / Commitments
 - f PE / South DOU
 - f Contract Deliverables db
 - f South Account Plan db
- Financial
 - f Financial Interlock
 - f Monthly analysis of CIF, CLAIM, RMS, Penalties, Capital/Expense,....
 - f Meetings with FA, Delivery, PE to discuss results
- Measurements
 - f Performance Standards
 - f Monthly reports
 - f WebStat updates
 - f Improvement Plans
- ■Project Management
 - f DOU/Interlock as a project
 - f Current Projects
 - f Methodology / Tools
- ■NBOs / Service Requests
 - f South Engagement Process
 - f Advantica account SR Procedure / Tool
- ■Problem Management
- Change Management
- ■Issues Management
- Executive Alerts / System Alerts / Crisis Mgmt

- Interface with non-South service providers
 - f Other SDCs
 - f OEM vendors
 - f Contractors
- Delivery Team interface(s)
- Customer Satisfaction Surveys
- ■Control Book
- ■ISO Audit Preparedness
 - f Processes and Desk Procedures
 - f Departmental documentation

PE / DPE / Delivery Roles & Responsibilities

Project Executive / Office	Service Delivery Project Executive	Delivery Tower Project Manager
OVERALL RESPONSIBILITIES	OVERALL RESPONSIBILITIES	OVERALL RESPONSIBILITIES
■Own the contract ■Own the overall customer relationship and customer satisfaction Single point of contact for customer Measure customer satisfaction ■Be an advocate to the customer for the service delivery team ■Total financial responsibility for the contract ■Negotiate on behalf of IBM Global Services for contract amendments and changes ■Own all subcontractor/third party relationships that are not owned by service delivery to satisfy the customer's wants/needs ■Own all transition plans (from a customer deliverable point of view) ■Own project schedules (cause them to be established and reported on) ■Proposal leadership for account ■Lead the creation of the account plan/strategy on a regular basis ■Qualify new business opportunities ■Opportunity/requirement identification and closure ■Establish and chair the Change Control Board for any changes/addendum ■Own all audit compliance reviews and actions	 Own cost management including annual DOU/Interlock plan negotiations Ensure positive customer satisfaction and customer relationship is maintained Provide PE/O with single point of contact Own delivering performance standards Own service quality Participate in the management of profit and expense with the PE Continually identify ways to reduce costs of delivering service Deliver on commitments Own/manage subcontractor/third party providers not owned by the PO Provide transition management/staff Technical design/proposal preparation and/or approval Participate in account plan/strategy on an agreed to time frame Opportunity/requirement identification, guidance, support, and closure Ensure technical support is provided Participate in the Change Control Board and/or change process Provide overall leadership and directions to the delivery team 	 Provide single point of contact for specific DPE/O Own cost management including annual DOU/interlock plan negotiations (for specific tower) Ensure positive customer satisfaction and customer relationship is maintained (for specific tower) Own delivering performance standards and client measurements (for specific tower) Own service quality (for specific tower) Continually identify ways to reduce costs of delivering service Deliver on commitments Own/manage subcontractors/third party providers administered by Tower Project Manager Provide transition management/staff Technical design/proposal preparation Opportunity/requirement identification, guidance, support, and closure Provide account leadership/direction and project management within tower Participate in the Change Control Board and/or change control process